

**MHPI PROGRAM EVALUATION PLAN (MHPI)
PROGRAM EVALUATION PLAN (PEP)
[NAME OF INSTALLATION]
PROJECT SUMMARY REPORT
PERIOD ENDED: [INSERT DATE]**

[Instructions: The Project Summary Report should include narrative and summary quantitative information regarding the current operating performance of the MHPI project and the progress made to date in achieving project objectives. The following categories are provided as a guide and have been developed in order to supplement information provided in the Project Fact Sheet and Project Monitoring Matrix.

Information provided in the Project Summary Report should focus on detailing any significant changes / differences / variations from the previous PEP reporting period. For example, if the Debt Coverage Ratio (DCR) has changed significantly from one period to the next, there should be an explanation as to why the change occurred and the impact this change may have on other factors such as loan repayments, contributions to reinvestment accounts, operations, etc. The report should also detail any actions taken or to be taken by the developer, property manager and/or government to address any particular issue.

The Portfolio Manager should include additional information as part of the Project Summary Report, as determined relevant.]

1. Financial Performance

- a. Debt Coverage Ratio (DCR)
- b. Comparison of budgeted to actual financial performance
- c. Payment performance to creditors and / or vendors
- d. Status of reinvestment account (i.e. amount of available cash in account compared to budgeted)

2. Management / Operations

- a. Occupancy
 - 1) Occupancy rate
 - 2) Breakdown of tenant population, including:
 - Number of military families
 - Number of other tenants by type

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- b. Property Management
 - 1) Condition of property
 - 2) Changes in key personnel or management company
 - 3) Frequency and nature of repair calls
 - 4) Any reported litigation

3. Development / Construction

- a. Schedule and milestones
- b. Approved design guidelines
- c. Other performance issues
- d. Warranty and / or post construction issues

4. Tenant Satisfaction (from tenant surveys)

- a. Based on the results reported in the Project Monitoring Matrix regarding the response to the tenant survey question – “Would you recommend privatized housing”, please provide detail to explain the meaning of the numbers, for example any change in the results from one period to another and what is being done to improve results.
- b. Comment on other information from the results of tenant surveys that address Quality of Life issues for service members and their families.

5. Changes to information provided in Project Fact Sheet

- a. Please use this section to detail any revisions to data provided in the Project Fact Sheet. This would include changes and / or corrections to a previously submitted Fact Sheet. The detail provided should explain both the change and the reason for the change.

6. Other Project Highlights

- a. Please use this section to explain any changes in expectations or observations regarding the performance and/or progress of the project. Some examples may

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include contract terms being revised, changes in the scope of the project, or use of an additional authority being contemplated.